

We, as nonprofits, must comply with and honor ethical practices as we work with donors' personal information. Each organization should draft privacy standards and donor expectations to ensure ethical practices.

The rise of the internet has made it more important than ever to verify information and have policies and procedures covering who, why, when, and what is shared internally (staff and board) and with volunteer fundraisers. Here are 'best practices':

- Recognize that everyone in fund development is responsible for collecting and securing donor/prospect information
- Set guidelines for collecting and using data and information
- Make sure sources are reliable; confirm data/information from multiple sources
- Set policies that define what information is confidential or 'privileged' in donor/prospect profiles; review policies often, especially as any new person is permitted access
- Define who has access to donor/prospect profiles; have everyone with access sign a confidentiality statement; do not disclose confidential information to unauthorized parties
- Be sure donor/prospect profiles and confidential information are under lock and key; electronic files are password protected; and, old/unused documents are shredded
- Be sure privileged information isn't shared in casual conversations or where unauthorized individuals can overhear it
- Don't transmit any documents as Word files (use PDFs), or by fax or email
- Recognize all donor/prospect information is the property of the organization creating the profile and not to be shared with any other outside person or organization
- Include information in donor/prospect profiles that will enhance your relationship; donors/prospects have the right to access to their file upon request so don't include information they wouldn't want to see there

It's all about relationships with our donors and prospects. Respect the privacy of prospects/donors: use information gathered through cultivation in a way that only enhances the relationship with the prospect/donor and your organization.

For more information on fundraising, visit the [Association of Fundraising Professionals website](#)